



DupeCatcher is a real-time deduplication app designed specifically for Salesforce. It is a 100% APEX developed and deployed managed package, and is installed via the Salesforce AppExchange, eliminating the need to download and maintain software.

User's Manual

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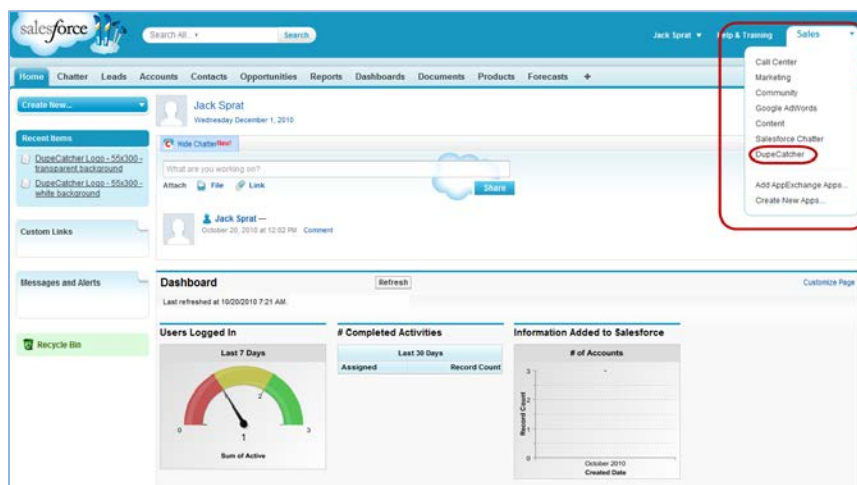
Introduction

DupeCatcher, by Symphonic Source, is a cloud-based Salesforce Deduplication App that is installed directly into a Salesforce org via the AppExchange. There is no software to download, install, or maintain.

Currently, DupeCatcher offers real time identification and blocking of duplicate leads, accounts, and contacts as they are manually entered into Salesforce. Plans for future versions of DupeCatcher include deduplication of mass imports, and data cleansing of an entire existing Salesforce database.

About DupeCatcher Filters and Rules

DupeCatcher functions based on Filters and Rules set by a Salesforce administrator. Once installed, admins will see a DupeCatcher option in the Salesforce dropdown menu on the top right.

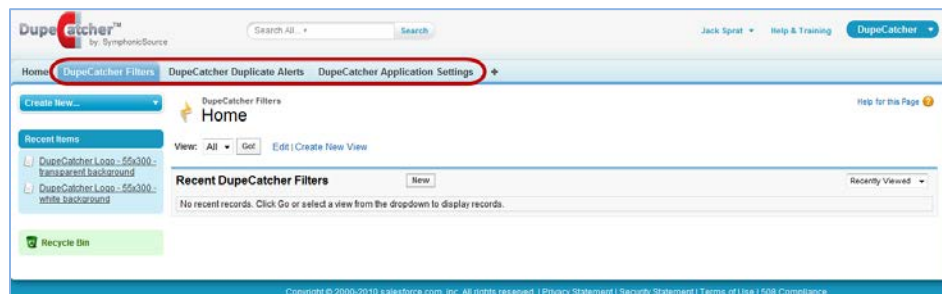


Selecting the DupeCatcher option will display DupeCatcher tabs in the main Salesforce window. Your options will be as follows:

DupeCatcher Filters: Select to set and activate Filters and Rules. Once Filters are set, you can view them from this tab by clicking the “Go” button next to the “View” drop down menu.

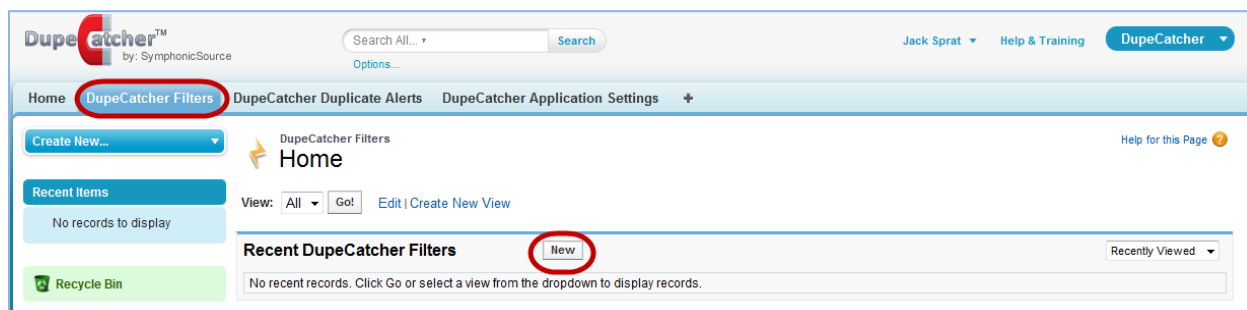
DupeCatcher Duplicate Alerts: If you set filters to create an alert when a duplicate is identified, those alerts will be viewable from this tab. Once Alerts are set or triggered, you can view them from this tab by clicking the “Go” button next to the “View” drop down menu. (Note: Alerts are also viewable from within the individual Filter details view.)

DupeCatcher Application Settings: For some lead sources (for instance, web-to-lead) you may want the record created even if it duplicates an existing record. DupeCatcher Application Settings give admins the ability to list certain lead sources (web, web-to-lead, etc.) that DupeCatcher will ignore. Leads from lead sources listed in this tab will be entered into the Salesforce org, and an alert will be triggered for the admin to review for duplication. From this tab, you can also set immediate reminders for tasks, and enable the DupeCatcher Override function.

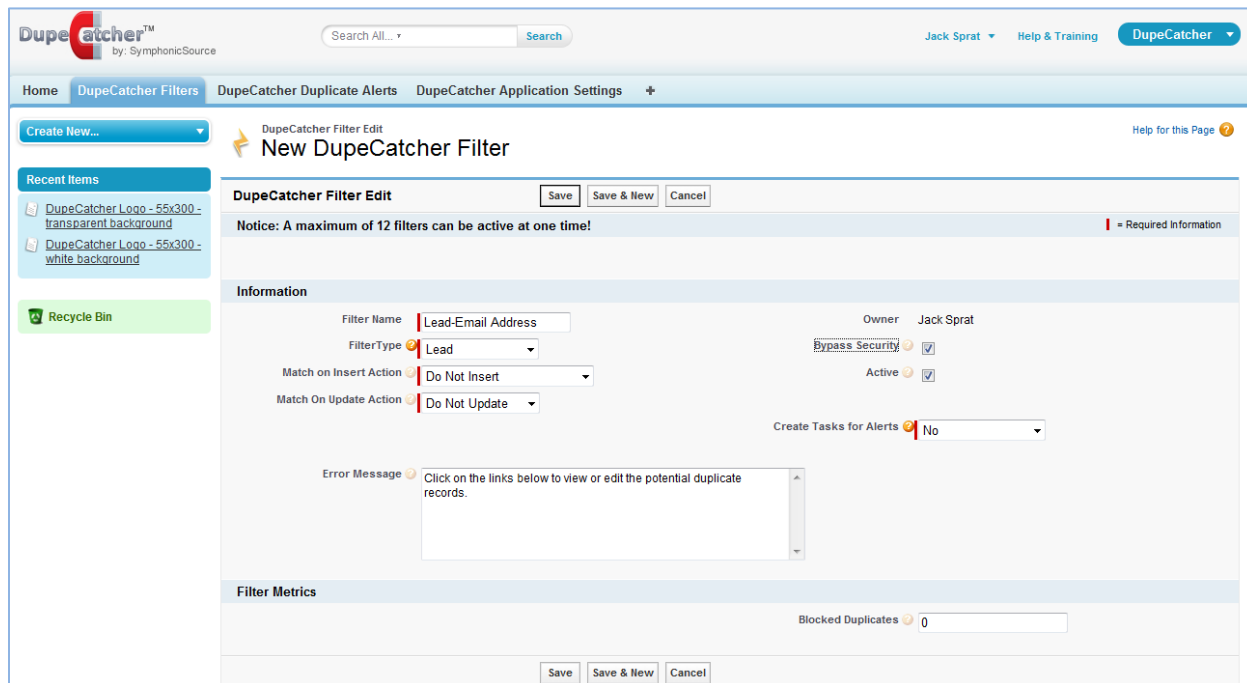


Creating Filters

The first step in identifying and blocking duplicates is to set Filters and Rules. Click on the DupeCatcher Filters tab from the DupeCatcher home page, then click “New” in the Recent DupeCatcher Filters area.

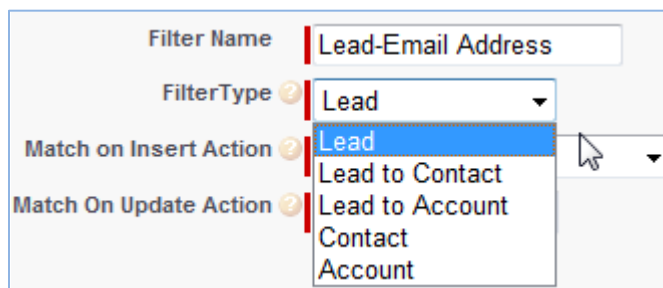


The Filters setup screen is very easy to use. Set the following parameters by either entering information, or by making selections from the drop down menus:



Filter Name: Create your own unique name for the filter. We recommend using something descriptive.

Filter Type: Select the type of record for which you want to block duplicates.

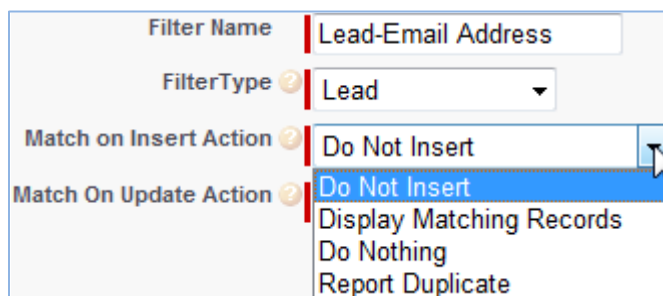


The screenshot shows the configuration interface with the following fields:

- Filter Name:** Lead-Email Address
- FilterType:** Lead
- Match on Insert Action:** Lead
- Match On Update Action:** Lead to Contact

The dropdown menu for FilterType is open, showing the following options: Lead, Lead to Contact, Lead to Account, Contact, and Account.

Match on Insert Action: Select the action you want DupeCatcher to take when it identifies a duplicate that is being *inserted* into the Salesforce org.

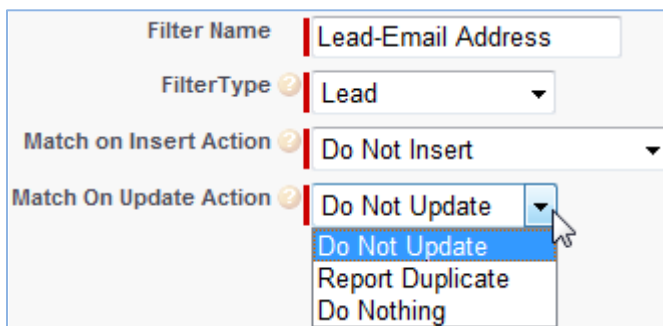


The screenshot shows the configuration interface with the following fields:

- Filter Name:** Lead-Email Address
- FilterType:** Lead
- Match on Insert Action:** Do Not Insert
- Match On Update Action:** Do Not Insert

The dropdown menu for Match on Insert Action is open, showing the following options: Do Not Insert, Display Matching Records, Do Nothing, and Report Duplicate.

Match on Update Action: Select the action you want DupeCatcher to take when it identifies a duplicate record that is being *updated* in the Salesforce org.



The screenshot shows the configuration interface with the following fields:

- Filter Name:** Lead-Email Address
- FilterType:** Lead
- Match on Insert Action:** Do Not Insert
- Match On Update Action:** Do Not Update

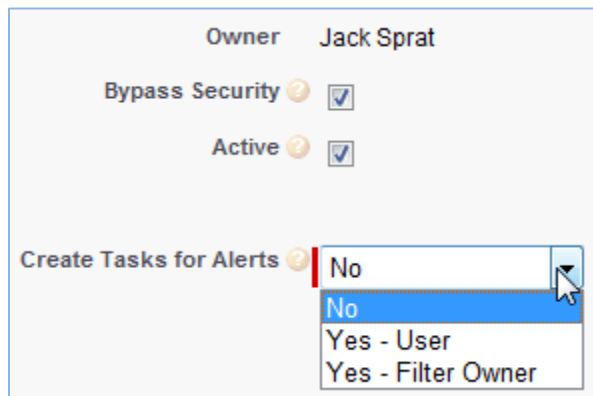
The dropdown menu for Match on Update Action is open, showing the following options: Do Not Update, Report Duplicate, and Do Nothing.

Error Message: Create an optional customized error message to display when DupeCatcher identifies a duplicate based on the filter.

Bypass Security: Checking this box directs DupeCatcher to check for matches against ALL records within the Salesforce org. Leaving this box unchecked directs DupeCatcher to check for matches ONLY against the records visible to the individual user entering new data.

Active: This box must be checked in order for the filter to function. *Note:* You can toggle this box to turn filters on and off as needed without deleting them.

Create Tasks for Alerts: Select an option if you want a Salesforce task to be set when a duplicate is identified. Alerts can be set for the user or for the owner/admin of the Filter. Tasks are set **ONLY** when the Match on Insert/Update Action is set to “Report Duplicate.” You also have the option of setting pop-up reminders for all tasks that get created. You choose to create these reminders on the Application Settings tab (see the Application Settings section below for details).



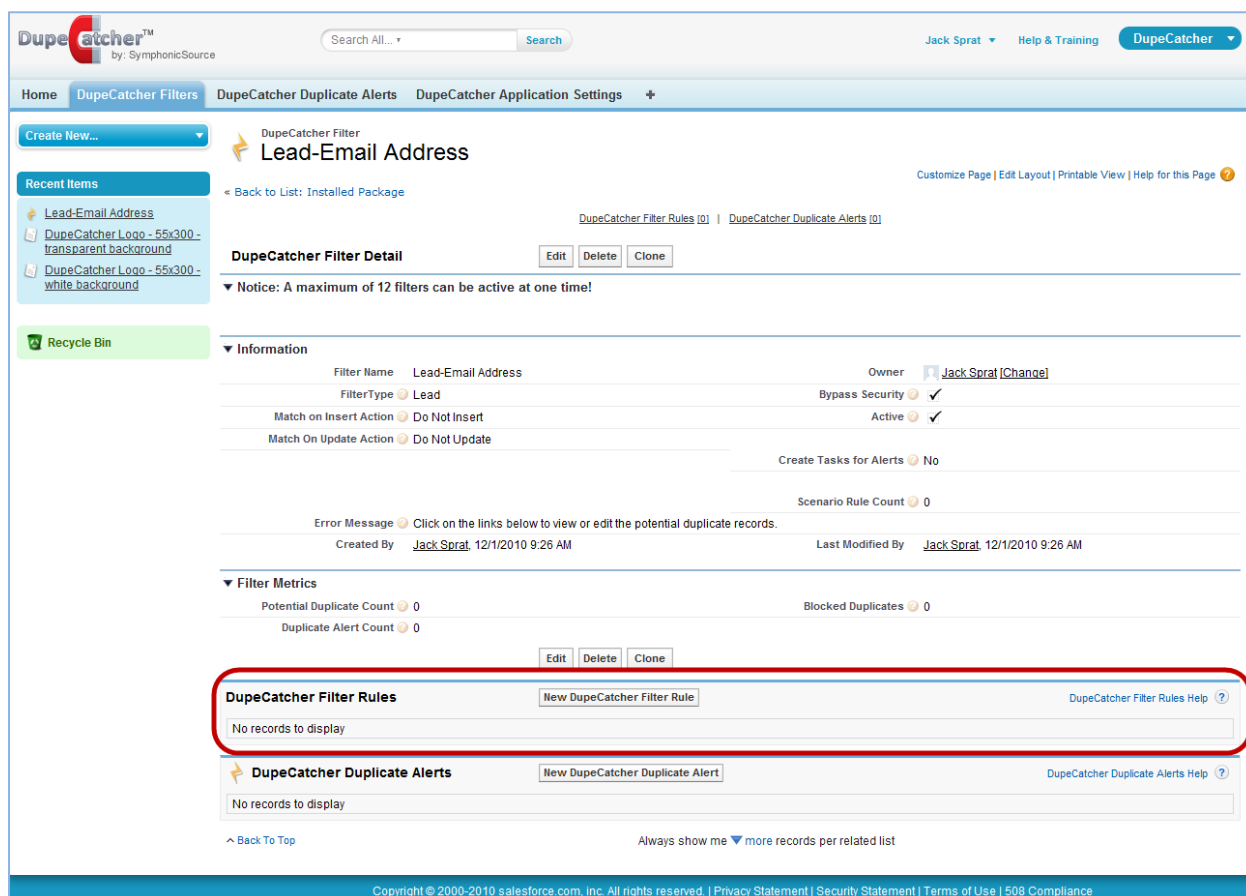
The screenshot shows a configuration window for a filter. At the top, it says 'Owner Jack Sprat'. Below that are two checked checkboxes: 'Bypass Security' and 'Active'. At the bottom, there is a dropdown menu labeled 'Create Tasks for Alerts'. The dropdown is open, showing four options: 'No' (selected), 'Yes - User', 'Yes - Filter Owner', and another 'No' option at the bottom. A mouse cursor is pointing at the 'Yes - Filter Owner' option.

Once all of your options have been set, click Save to create the Filter. You will be redirected to the Filter Details page, which shows the settings you made, metrics on duplicates, Rules that apply to this Filter, and any alerts that have been triggered when a duplicate is identified.

Creating Rules

IMPORTANT: In order for a Filter to work, you must set a Rule for that Filter.

From the Filter Details page, click New DupeCatcher Filter Rule in the DupeCatcher Filter Rules section.



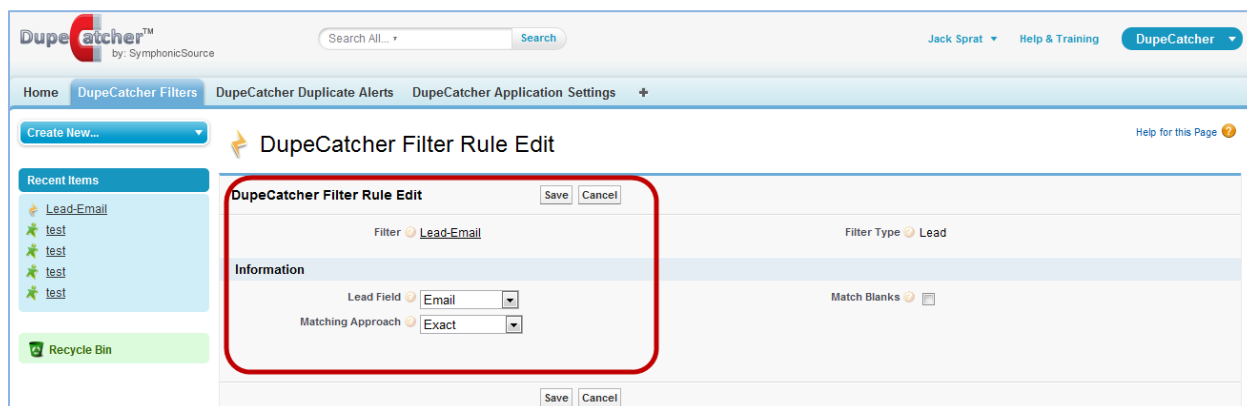
The screenshot shows the DupeCatcher web interface. The top navigation bar includes 'Home', 'DupeCatcher Filters', 'DupeCatcher Duplicate Alerts', and 'DupeCatcher Application Settings'. The main content area is titled 'DupeCatcher Filter Lead-Email Address'. It features a 'Recent Items' sidebar with links to 'Lead-Email Address' and two DupeCatcher Logo images. The main section displays filter details for 'Lead-Email Address', including 'Filter Name', 'Filter Type' (Lead), 'Owner' (Jack Sprat), 'Bypass Security' (checked), 'Active' (checked), 'Match on Insert Action' (Do Not Insert), 'Match on Update Action' (Do Not Update), 'Create Tasks for Alerts' (No), 'Scenario Rule Count' (0), 'Error Message' (Click on the links below to view or edit the potential duplicate records), 'Created By' (Jack Sprat, 12/1/2010 9:26 AM), and 'Last Modified By' (Jack Sprat, 12/1/2010 9:26 AM). Below this is the 'Filter Metrics' section showing 'Potential Duplicate Count' (0) and 'Blocked Duplicates' (0). At the bottom, the 'DupeCatcher Filter Rules' section is highlighted with a red box, showing 'No records to display' and a 'New DupeCatcher Filter Rule' button. The 'DupeCatcher Duplicate Alerts' section also shows 'No records to display' and a 'New DupeCatcher Duplicate Alert' button. The footer contains copyright information and links to Privacy Statement, Security Statement, Terms of Use, and 508 Compliance.

From the Filter Rule Edit page, you can select the record fields (both standard and custom) and methods you want DupeCatcher to check to identify duplicates. Your options will vary slightly depending on the type of Filter you've created in Step 1.

Field: Select from the standard Salesforce fields, or your custom fields. You will always have at least one field (from a Lead, Account, or Contact) to select.

Matching Approach: Allows you to select the kind and degree of match for which DupeCatcher checks. Matching Approach options include Exact, First N Letters/Numbers, Domain, etc., and will vary based on the fields you've selected.

Match Blanks: If selected, DupeCatcher will block duplicates based on the fields selected in the Rules users set if those fields are left blank. For example, if the Rule checks the email field, and the email field is left blank, DupeCatcher will return a list of records whose email field is blank.



DupeCatcher Filter Rule Edit

Filter: Lead-Email

Filter Type: Lead

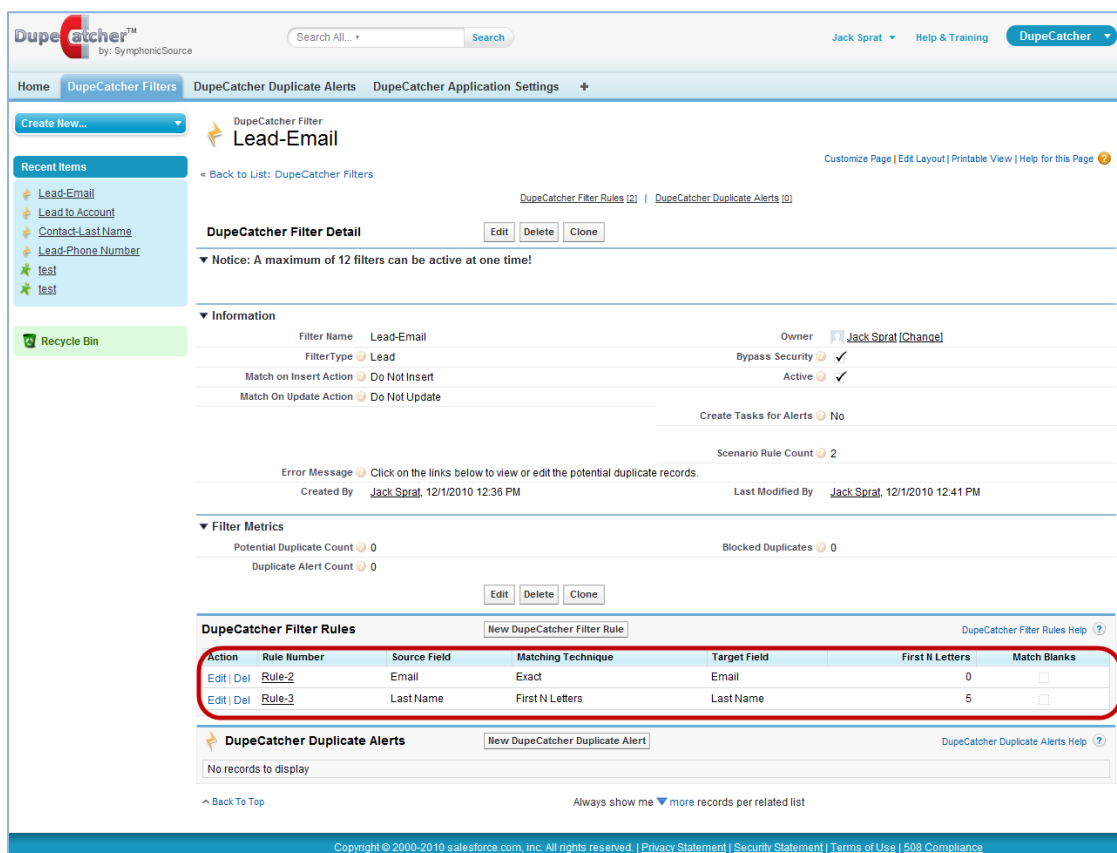
Information

Lead Field: Email

Matching Approach: Exact

Match Blanks: ☐

Once you save a Rule, you will be redirected to the Filter Summary page. All Rules for an individual Filter will be listed on this page. From this page, you can Edit and Delete Rules, or view a Rule summary page using hyperlinks.



DupeCatcher Filter Summary

Lead-Email

Back to List: DupeCatcher Filters

DupeCatcher Filter Rules (2) | DupeCatcher Duplicate Alerts (0)

DupeCatcher Filter Detail

Notice: A maximum of 12 filters can be active at one time!

Information

Filter Name: Lead-Email

Filter Type: Lead

Match on Insert Action: Do Not Insert

Match on Update Action: Do Not Update

Owner: Jack Sprat [Change]

Bypass Security: ☒

Active: ☒

Create Tasks for Alerts: No

Scenario Rule Count: 2

Error Message: Click on the links below to view or edit the potential duplicate records.

Created By: Jack Sprat, 12/1/2010 12:36 PM

Last Modified By: Jack Sprat, 12/1/2010 12:41 PM

Filter Metrics

Potential Duplicate Count: 0

Duplicate Alert Count: 0

Blocked Duplicates: 0

DupeCatcher Filter Rules

Action	Rule Number	Source Field	Matching Technique	Target Field	First N Letters	Match Blanks
Edit / Del	Rule-2	Email	Exact	Email	0	☐
Edit / Del	Rule-3	Last Name	First N Letters	Last Name	5	☐

DupeCatcher Duplicate Alerts

No records to display

You can have multiple Filters and multiple Rules within individual Filters running at the same time, but please note that Filters operate on an OR logic, and Rules operate on an AND logic. That is, only one

Filter out of multiple Filters needs to identify a duplicate for an alert to trigger. The first Filter to trigger an alert is reported, and all subsequent Filters are not processed. All Rules within an individual Filter must match for that Filter to trigger an alert.

Once you have your Filters and Rules set, DupeCatcher is ready to work. As long as you have selected Active in at least one of your Filters, DupeCatcher will function as records are added to Salesforce.

Managing Alerts

Based on the Filters and Actions you have set, DupeCatcher will either:

1. Block a duplicate record from being created, and display a warning with a list of hyperlinks to matched records. See below:


Lead Edit

[Help for this Page](#)

New Lead

Lead Edit

Error: Invalid Data.
Review all error messages below to correct your data.

DUPECATCHER WARNING! The Lead that you created was not saved.
It has been blocked because the value of the Lead 'Email' field that you entered is similar to the 'Email' field of the Leads listed below.

Click on the links below to view or edit the potential duplicate records.

Potential duplicate Lead record: [test](#)
Potential duplicate Lead record: [test](#)
Potential duplicate Lead record: [test](#)

Lead Information

= Required Information

Lead Owner: Jack Sprat
First Name: --None--
Last Name: test
Company: test
Title:

Lead Status: Open
Phone:
Email: test@test.com
Rating: --None--

2. Block a duplicate record from being created, and display a table with a hyperlinked list of matched records. See below:



DupeCatcher Potential Duplicate Warning!

You have been redirected to this page because DupeCatcher has determined your entry to be a duplicate.
The [Lead](#) that you created **has not been saved!**

Your entry has been blocked because the value of the 'Email' field of the record that you created is similar to the value of the 'Email' field of the [Leads](#) listed below.

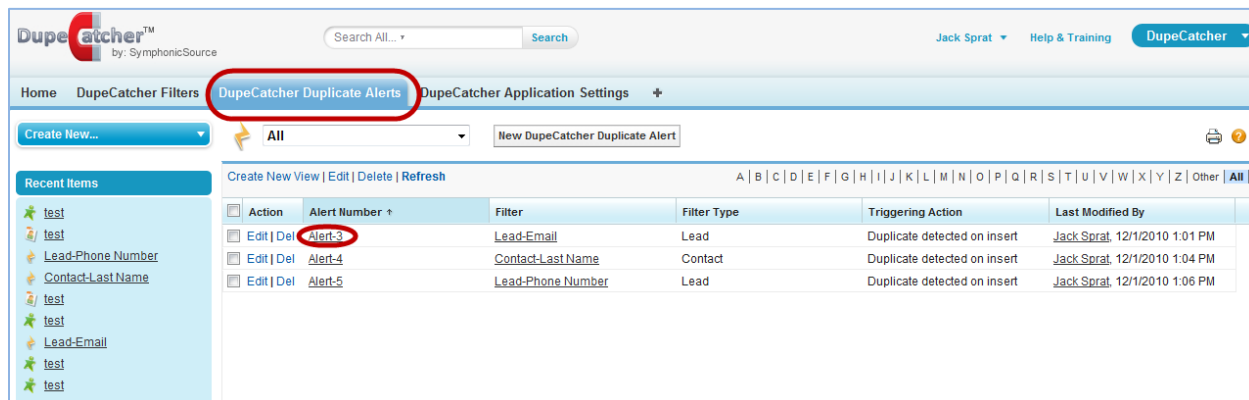
[Click on the links below to view or edit the potential duplicate records.](#)

Potential Duplicate Lead Records:

Action	Name	Company	Email	Postal Code	Owner	Created By	Created Date
View Edit	test	test	test@test.com				Tue Nov 30 17:30:21 GMT 2010
View Edit	test	test	test@test.com				Tue Nov 30 17:33:41 GMT 2010
View Edit	test	test	test@test.com				Tue Nov 30 17:34:52 GMT 2010

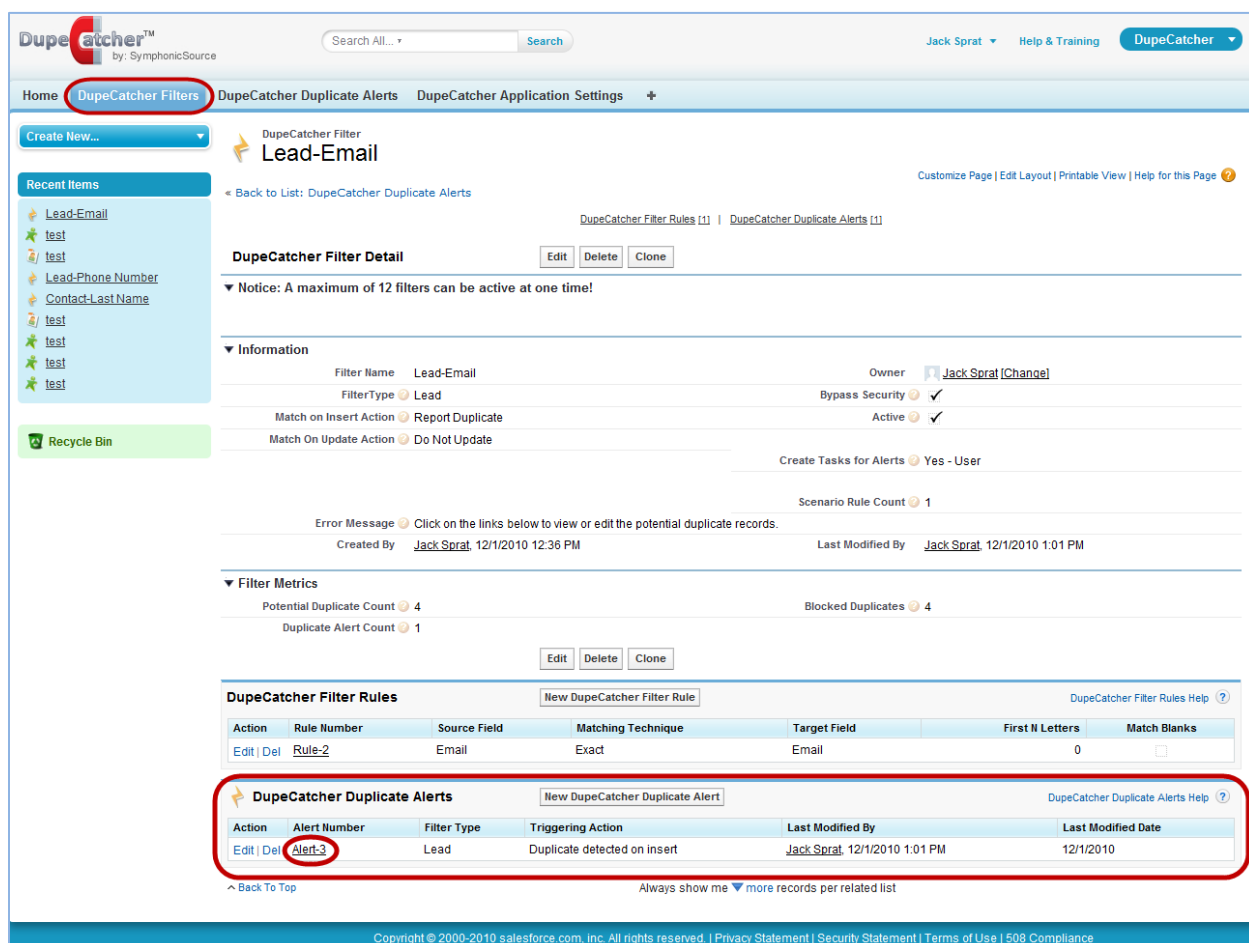
- Allow the duplicate record to be created, but trigger an alert and, if chosen, set a task for the user or the admin.

Alerts can be accessed from DupeCatcher Duplicate Alerts tabs, or from the Filter summary page:



The screenshot shows the DupeCatcher Duplicate Alerts page. The 'DupeCatcher Duplicate Alerts' tab is highlighted in the top navigation bar. Below the navigation bar, there is a 'Create New...' button and a dropdown menu set to 'All'. A table lists several duplicate alerts:

Action	Alert Number	Filter	Filter Type	Triggering Action	Last Modified By
Edit Del	Alert-3	Lead-Email	Lead	Duplicate detected on insert	Jack Sprat, 12/1/2010 1:01 PM
Edit Del	Alert-4	Contact-Last Name	Contact	Duplicate detected on insert	Jack Sprat, 12/1/2010 1:04 PM
Edit Del	Alert-5	Lead-Phone Number	Lead	Duplicate detected on insert	Jack Sprat, 12/1/2010 1:06 PM



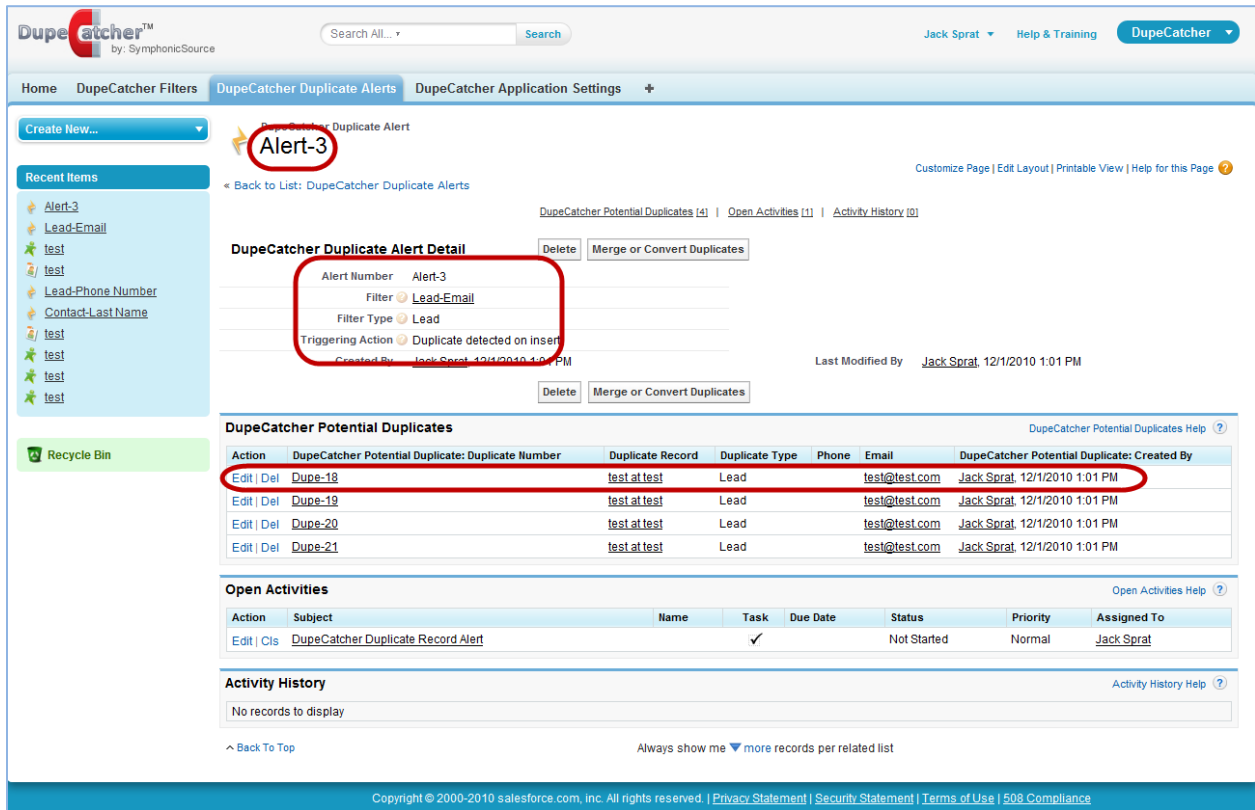
The screenshot shows the DupeCatcher Filter Detail page for the 'Lead-Email' filter. The 'DupeCatcher Filters' tab is highlighted in the top navigation bar. Below the navigation bar, there is a 'Create New...' button and a dropdown menu set to 'Lead-Email'. The page displays various details about the filter, including its name, type, and owner. A table lists the filter rules:

Action	Rule Number	Source Field	Matching Technique	Target Field	First N Letters	Match Blanks
Edit Del	Rule-2	Email	Exact	Email	0	☐

Below the filter rules, there is a 'DupeCatcher Duplicate Alerts' section with a table listing the alerts:

Action	Alert Number	Filter Type	Triggering Action	Last Modified By	Last Modified Date
Edit Del	Alert-3	Lead	Duplicate detected on insert	Jack Sprat, 12/1/2010 1:01 PM	12/1/2010

From the Duplicate Alerts tab or from the Filter summary page, you can drill down into the details of individual alerts, details of individual duplicate notifications, and directly into the specific duplicated record.



DupeCatcher™ by SymphonicSource

Search All... Search

Jack Sprat Help & Training DupeCatcher

Home DupeCatcher Filters DupeCatcher Duplicate Alerts DupeCatcher Application Settings

Create New...

Recent Items

- Alert-3
- Lead-Email
- test
- test
- Lead-Phone Number
- Contact-Last Name
- test
- test
- test
- test

Recycle Bin

DupeCatcher Duplicate Alert Detail

Alert Number: Alert-3

Filter: Lead-Email

Filter Type: Lead

Triggering Action: Duplicate detected on insert

Created By: Jack Sprat 12/1/2010 1:01 PM

Last Modified By: Jack Sprat 12/1/2010 1:01 PM

DupeCatcher Potential Duplicates

Action	DupeCatcher Potential Duplicate: Duplicate Number	Duplicate Record	Duplicate Type	Phone	Email	DupeCatcher Potential Duplicate: Created By
Edit Del	Dupe-18	test at test	Lead		test@test.com	Jack Sprat 12/1/2010 1:01 PM
Edit Del	Dupe-19	test at test	Lead		test@test.com	Jack Sprat 12/1/2010 1:01 PM
Edit Del	Dupe-20	test at test	Lead		test@test.com	Jack Sprat 12/1/2010 1:01 PM
Edit Del	Dupe-21	test at test	Lead		test@test.com	Jack Sprat 12/1/2010 1:01 PM

Open Activities

Action	Subject	Name	Task	Due Date	Status	Priority	Assigned To
Edit Cts	DupeCatcher Duplicate Record Alert		✓		Not Started	Normal	Jack Sprat

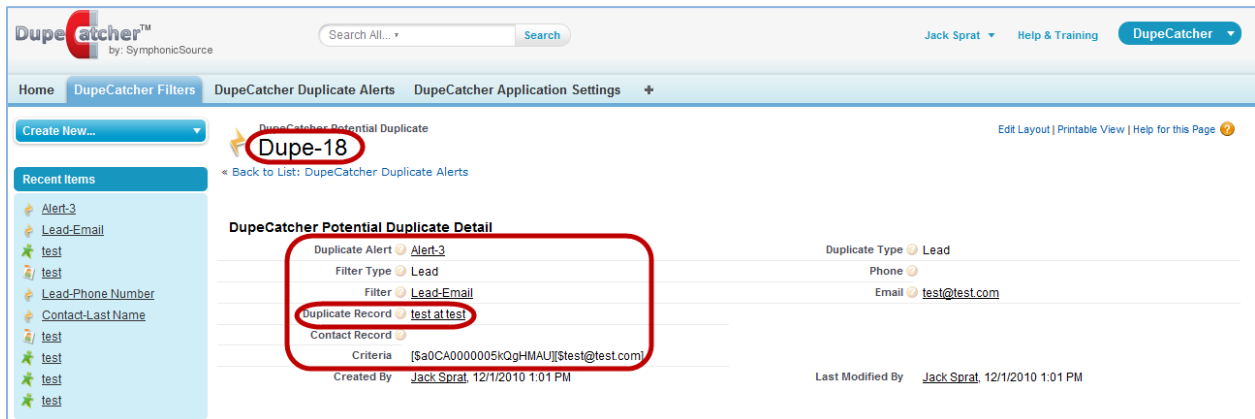
Activity History

No records to display

Back To Top

Always show me more records per related list

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DupeCatcher™ by SymphonicSource

Search All... Search

Jack Sprat Help & Training DupeCatcher

Home DupeCatcher Filters DupeCatcher Duplicate Alerts DupeCatcher Application Settings

Create New...

Recent Items

- Alert-3
- Lead-Email
- test
- test
- Lead-Phone Number
- Contact-Last Name
- test
- test
- test
- test

DupeCatcher Potential Duplicate Detail

Duplicate Alert: Alert-3

Filter Type: Lead

Filter: Lead-Email

Duplicate Record: test at test

Contact Record

Criteria: [Sa0CA0000005kQgHMAUJ]test@test.com

Created By: Jack Sprat 12/1/2010 1:01 PM

Duplicate Type: Lead

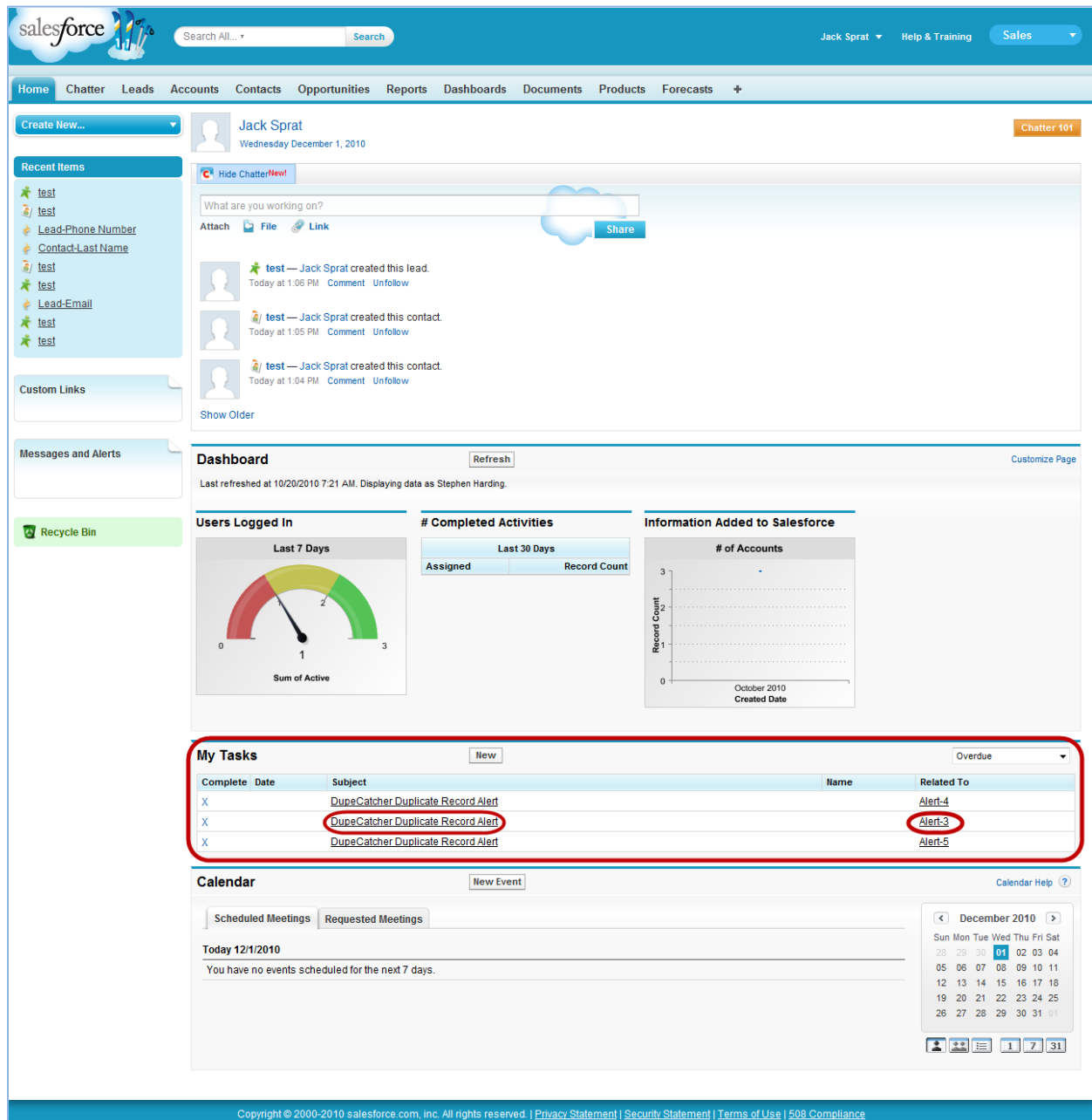
Phone

Email: test@test.com

Last Modified By: Jack Sprat 12/1/2010 1:01 PM

Managing Tasks

DupeCatcher tasks function just like other Salesforce tasks—they're a notification to a user about a change or some required action. DupeCatcher tasks notify users that duplicates have been identified, and they provide hyperlinks to the specific alert where details are available and the original records can be drilled into via hyperlinks. Tasks are accessed from the user's Salesforce home page.



The screenshot shows the Salesforce home page for user Jack Sprat. The 'My Tasks' section is highlighted with a red border and contains the following table:

Complete	Date	Subject	Name	Related To
X		DupeCatcher Duplicate Record Alert		Alert-4
X		DupeCatcher Duplicate Record Alert		Alert-3
X		DupeCatcher Duplicate Record Alert		Alert-5

The 'Alert-3' link in the 'Related To' column is circled in red. Below the 'My Tasks' section is the 'Calendar' section, which shows a calendar for December 2010 and a message: 'You have no events scheduled for the next 7 days.'

The Task details page provides buttons to manage the task, as well as hyperlink to the specific Alert that triggered the task.

Task

DupeCatcher Duplicate Record Alert

Edit Layout | Help for this Page

1

7

31

[Back to List: DupeCatcher Duplicate Alerts](#)

Task Detail

EditDeleteCreate Follow Up TaskCreate Follow Up Event

▼ Task Information

Assigned To

Jack Sprat

Related To

Alert-3

Subject

DupeCatcher Duplicate Record Alert

Name

Due Date

Comments

A potential duplicate was found. Please click on the Related-To field to handle potential duplicates

▼ Additional Information

Status

Not Started

Phone

Priority

Normal

Email

▼ System Information

Created By

Jack Sprat 12/1/2010 1:01 PM

Last Modified By

Jack Sprat 12/1/2010 1:01 PM

Reminder

Reminder

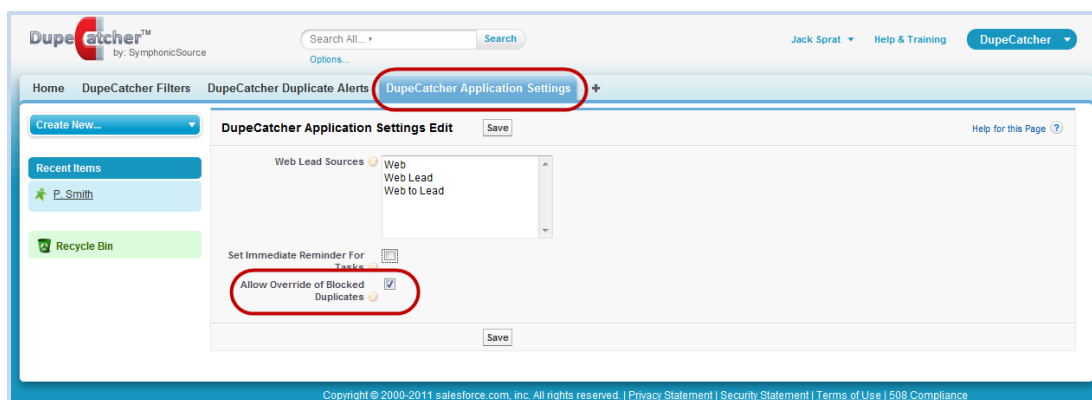
EditDeleteCreate Follow Up TaskCreate Follow Up Event

Override Function

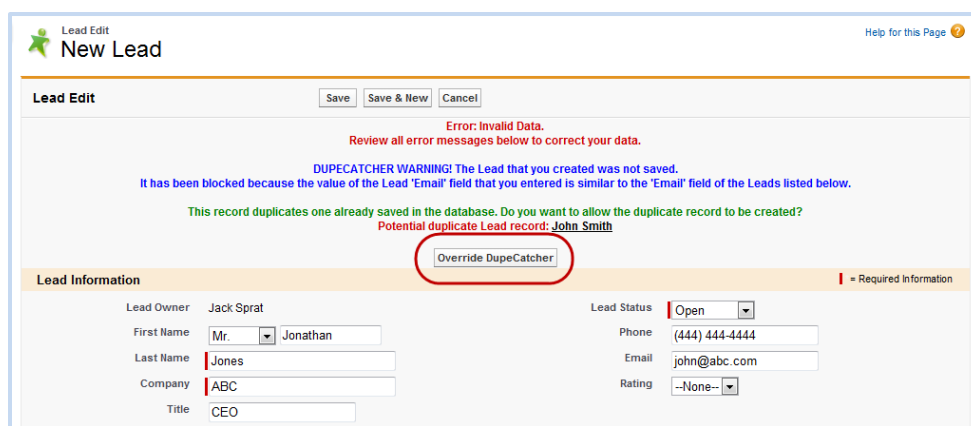
Certain individual business processes and policies may require that duplicate records be entered into Salesforce. Because of this requirement, DupeCatcher has an Override function. Currently Override is available ONLY in Enterprise Edition and higher.

The Override function must be enabled by the Salesforce or DupeCatcher admin via a checkbox on the DupeCatcher Application Settings tab (see the Allow Override section below for details). NOTE: Certain permissions may need to be set for Override to be enabled for all users. Override only functions when the Filter Matching Action is set to Do Not Insert/Update. Further, the Override button will not appear on a DupeCatcher warning triggered by an update if the user updated a record using inline editing. The Override button will only appear when users use the edit button and edit page to update records.

Simply check the check box, and click Save.



With the Override feature turned on, a button will appear on the Do Not Insert/Do Not Update screens of identified duplicate records.



If the user wants to allow the duplicate record to be created, all he or she needs to do is click the Override button, and the new, duplicate record will be saved.

Merge and Convert Functions

DupeCatcher makes it even easier to manage the data entering your Salesforce org with its Merge and Convert functions. The Merge feature allows users to combine identified duplicates into a single record of the same type (Lead to Lead, Account to Account, Contact to Contact). The Convert feature automates the process of combining an Account or a Contact with a new Lead that has been identified as its duplicate. An added feature of DupeCatcher's Lead to Contact and Lead to Account conversion process is that DupeCatcher will also pull in any existing Leads to the Convert process that match on the same field as the Contact or Account.

DupeCatcher's Merge and Convert functions are enabled when a Filter's matching action (both for insert and for update) is set to "Report Duplicate." Remember, this particular matching action allows the duplicate record to be created, but creates an alert for the user or admin to take action. It is via these alerts that users can Merge or Convert duplicates.

From an alert that has been triggered as a result of a Filter set to "Report Duplicate," you will see a Merge or Convert Duplicates button, as well as a brief listing of the records and their types identified as duplicates.


DupeCatcher Duplicate Alert
Alert-3

[Customize Page](#) | [Edit Layout](#) | [Printable View](#) | [Help for this Page](#)

[Back to List: DupeCatcher Duplicate Alerts](#)

[DupeCatcher Potential Duplicates](#) (4) | [Open Activities](#) (1) | [Activity History](#) (0)

DupeCatcher Duplicate Alert Detail

Delete
Merge or Convert Duplicates

Alert Number: Alert-3
Filter: [Convert Test](#)
Filter Type: [Lead to Contact](#)
Triggering Action: [Duplicate detected on insert](#)
Created By: [Jack Sprat](#), 1/12/2011 2:29 PM
Last Modified By: [Jack Sprat](#), 1/12/2011 2:29 PM

Delete
Merge or Convert Duplicates

DupeCatcher Potential Duplicates

[DupeCatcher Potential Duplicates Help](#)

Action	DupeCatcher Potential Duplicate: Duplicate Number	Duplicate Record	Duplicate Type	Phone	Email	DupeCatcher Potential Duplicate: Created By
Edit Del	Dupe-10	Jane Doe at Test Company	Contact	(321) 654-9877	test@test.com	Jack Sprat , 1/12/2011 2:29 PM
Edit Del	Dupe-11	Betsy Ross at Flag Makers USA	Contact	(444) 444-4444	test@test.com	Jack Sprat , 1/12/2011 2:29 PM
Edit Del	Dupe-12	John Smith at Test Company	Lead	(987) 654-3211	test@test.com	Jack Sprat , 1/12/2011 2:29 PM
Edit Del	Dupe-13	Jane Donut at Test Company	Lead	(879) 645-3211	test@test.com	Jack Sprat , 1/12/2011 2:29 PM

Open Activities

[Open Activities Help](#)

Action	Subject	Name	Task	Due Date	Status	Priority	Assigned To
Edit Cls	DupeCatcher Duplicate Record Alert		✓		Not Started	Normal	Jack Sprat

Activity History

[Activity History Help](#)

No records to display

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Always show me [more records per related list](#)

Merge (Lead, Contact, or Account Filters)

Clicking the Merge or Convert Duplicates button will return a table listing duplicated records, with radio buttons next to each field. Select a master record to work from. In the case of multiple duplicates, select the records you want to merge into a single record with a check box. Then select the radio button(s) from the other records for the correct data points. As you select fields, the data points will change in the “Merge Results” column, providing you with a preview of the data that will populate the final record. Once your fields are selected, click the Merge button, and you will be presented with a single, merged and deduplicated record.

DupeCatcher Merge

First select the Lead Record that you would like to merge values to.
Then select values from the other records that you would like to merge to that record.
Selected values will show in the “Merge Results” column.

Field	Merge Result	John Smith	Jonathan Smith	Johnny Smith
Merge To	John Smith	☒	☐	☐
Lead Select		☐	☐	☒
Zip/Postal Code	32875	☐ 75234	☐ 78965	☒ 32875
Phone	(324) 789-3214	☐ (987) 654-3211	☐ (654) 987-3211	☒ (324) 789-3214
Street	1234 Main St.	☒ 1234 Main St.	☐ 1234 Elm St.	☐ 1234 Main St.
Unread By Owner	false	☒ false	☐ false	☐ false
City	Any Town	☒ Any Town	☐ Any Town	☐ Any Town
Correlation Data	none	☒ none	☐ none	☐ none
Status	Open	☒ Open	☐ Open	☐ Open
Email Opt Out	false	☒ false	☐ false	☐ false
CorrelationID	none	☒ none	☐ none	☐ none
Owner ID	Jack Sprat	☒ Jack Sprat	☐ Jack Sprat	☐ Jack Sprat
Fax Opt Out	false	☒ false	☐ false	☐ false
Web Source	none	☒ none	☐ none	☐ none
Country	US	☒ US	☐	☐
Email	test@test.com	☒ test@test.com	☐ test@test.com	☐ test@test.com
Do Not Call	false	☒ false	☐ false	☐ false
Company	Test Company	☒ Test Company	☐ Test Company	☐ Test Company
State/Province	UT	☐ TX	☐ AL	☒ UT
Last Name	Smith	☒ Smith	☐ Smith	☐ Smith
Title	President	☒ President	☐ President	☐ Pres.
Website	www.test.com	☒ www.test.com	☐ www.testcompany.com	☐ www.test.com
First Name	John	☒ John	☐ Jonathan	☐ Johnny
Salutation	Mr.	☒ Mr.	☐ Mr.	☐ Mr.
Created By ID	Jack Sprat	☒ Jack Sprat	☐ Jack Sprat	☐ Jack Sprat
System Modstamp	2011-01-12 20:26:34	☒ 2011-01-12 20:26:34	☐ 2011-01-12 22:42:58	☐ 2011-01-12 22:44:30
Created Date	2011-01-12 17:18:53	☒ 2011-01-12 17:18:53	☐ 2011-01-12 22:42:58	☐ 2011-01-12 22:44:30
Last Modified By ID	Jack Sprat	☒ Jack Sprat	☐ Jack Sprat	☐ Jack Sprat
Last Modified Date	2011-01-12 20:26:34	☒ 2011-01-12 20:26:34	☐ 2011-01-12 22:42:58	☐ 2011-01-12 22:44:30
Last Transfer Date	2011-01-12 17:18:53	☒ 2011-01-12 17:18:53	☐ 2011-01-12 22:42:58	☐ 2011-01-12 22:44:30

Merge
Cancel

In the case of Merge, once the records have been merged, the referring alert and task will be removed.

Convert (Lead to Contact, Lead to Account)

When Converting a Lead to a Contact and/or Account, you will be presented with a table of relevant records that matched your filtering criteria. If there is more than one Contact or Account, select the record you want to serve as the master via the radio button at the top (if there is only one, DupeCatcher will select it by default). On the Leads side of the table, select or deselect the records that you want to convert via the checkbox at the top.

DupeCatcher Convert

First select the Contact record that you would like to convert Leads to. Then select the Lead records that you would like to convert. Press the "Next" button when done

Contacts

Field	Jane Doe	Betsy Ross
Contact Select	☒	☐
Business Phone	(321) 654-9877	(444) 444-4444
Last Name	Doe	Ross
Mailing Country	US	
Mobile Phone	(654) 987-3211	
Title	President	Seamstress
Mailing Street	1234 Main St.	1234 Old Glory Way
Account ID	Test Company	Flag Makers USA
Business Fax	(555) 555-5555	
Email Opt Out	false	false
Mailing Zip/Postal Code	75234	54638
First Name	Jane	Betsy
Owner ID	Jack Sprat	Jack Sprat
Fax Opt Out	false	false
Email	test@test.com	test@test.com
Do Not Call	false	false
Salutation	Ms.	Ms.
Mailing City	Any Town	Stars and Stripes
Mailing State/Province	TX	VA
Created By ID	Jack Sprat	Jack Sprat
Last Modified Date	2011-01-12 20:51:24	2011-01-12 22:27:33
System Modstamp	2011-01-12 20:51:24	2011-01-12 22:27:33
Created Date	2011-01-12 20:51:09	2011-01-12 22:27:33
Last Modified By ID	Jack Sprat	Jack Sprat

Leads

Field	John Smith	Jane Donut
Lead Select	☐	☒
Zip/Postal Code	75234	87324
Phone	(987) 654-3211	(879) 645-3211
Street	1234 Main St.	1234 Main St.
Unread By Owner	false	false
City	Any Town	Any Town
Correlation Data	none	none
Status	Open	Open
Email Opt Out	false	false
CorrelationID	none	none
Owner ID	Jack Sprat	Jack Sprat
Fax Opt Out	false	false
Web Source	none	none
Country	US	
Email	test@test.com	test@test.com
Do Not Call	false	false
Company	Test Company	Test Company
State/Province	TX	AL
Last Name	Smith	Donut
Title	President	
Website	www.test.com	www.testcompany.com
First Name	John	Jane
Salutation	Mr.	Ms.
Created By ID	Jack Sprat	Jack Sprat
System Modstamp	2011-01-12 20:26:34	2011-01-12 22:29:16
Created Date	2011-01-12 17:18:53	2011-01-12 22:29:15

Cancel

Next >>

You will be presented with conversion submission page where you can create an opportunity, set a follow up task, set a task reminder, and other activities associate with converting Leads to Accounts and/or Contacts. Once you've added any desired details, click the "Submit" button, and you will be redirected to the new, converted Account or Contact record.



DupeCatcher Lead Convert Submit

Submitting this page can result in the Alert being deleted. Refer to the DupeCatcher documentation for details on the conditions under which the alert will be deleted.

DupeCatcher Lead Convert Submit

Submit Cancel

Convert Leads Information

= Required Information

Account Name

Test Company

Converted Status

Qualified

Opportunity Name

Test Company-

Do Not Create Opportunity

☒

Send Email To Owners

☐

Overwrite Lead Source

☐

Task Information

Subject

Call

Status

Not Started

Due Date

1/25/2011

1/12/2011

Priority

Normal

Task Email Description Information

Send Notification Email

☒

Comments For Task

Task Reminder

= Required Information

Reminder Set

☒

Reminder Date/Time

1/24/2011 2:37 PM

1/12/2011 2:38 PM

Submit

Cancel

In the case of Convert, if all duplicates have been converted, the referring alert and task will be removed. If one or more matched records remain unconverted, the referring alert and task will be preserved.

A note on user security settings:

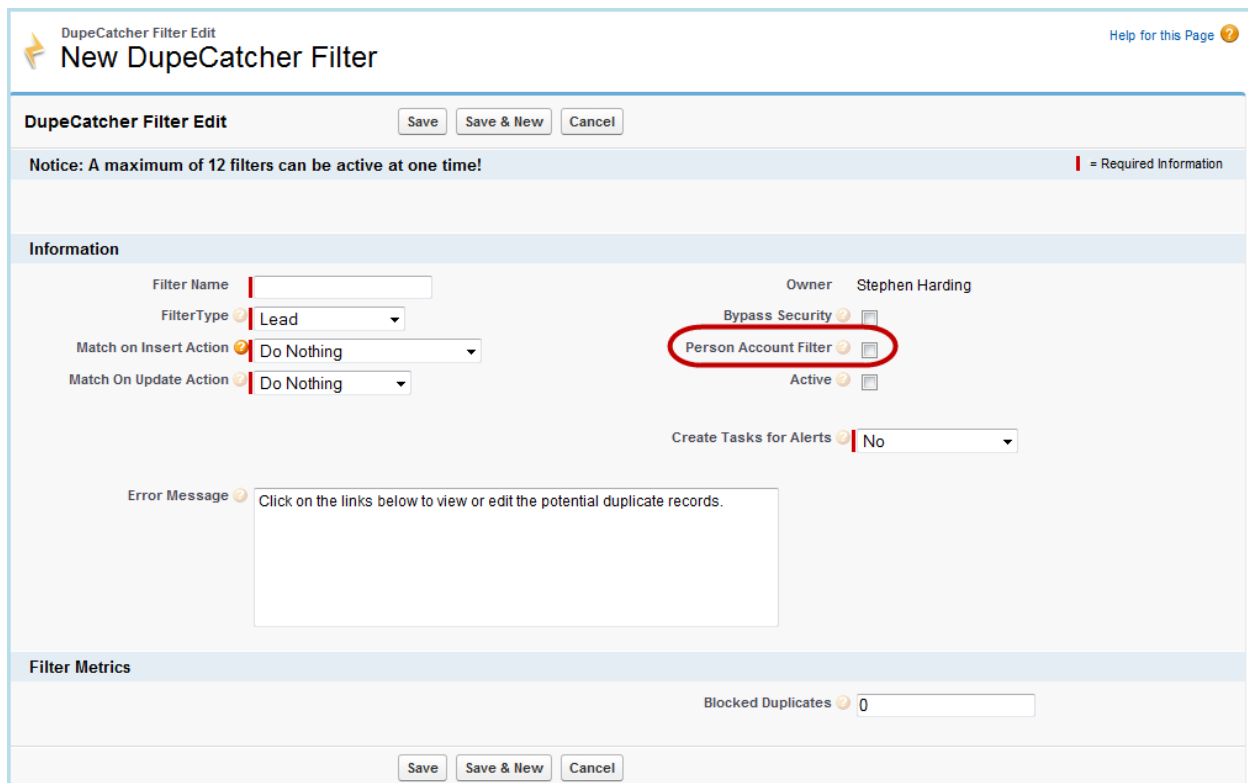
Merge and Convert features may function differently for users with restrictive security settings. In these instances, users may be prevented from completing the Merge or Convert process and will need to contact a Salesforce user with higher-level access privileges.

Person Accounts

Setup

DupeCatcher v1.70 and higher supports deduplication of Salesforce Person Accounts. The following instructions describe how to setup and enable DupeCatcher support for Person Accounts in your Salesforce org.

1. The Person Account Filter check box must be manually added to DupeCatcher Filter edit page:



The screenshot shows the 'DupeCatcher Filter Edit' page for a 'New DupeCatcher Filter'. The page includes a header with the DupeCatcher logo and a 'Help for this Page' link. Below the header is a 'DupeCatcher Filter Edit' section with 'Save', 'Save & New', and 'Cancel' buttons. A notice states: 'A maximum of 12 filters can be active at one time!'. The main section is titled 'Information' and contains several fields: 'Filter Name' (text input), 'FilterType' (dropdown menu set to 'Lead'), 'Match on Insert Action' (dropdown menu set to 'Do Nothing'), 'Match On Update Action' (dropdown menu set to 'Do Nothing'), 'Owner' (Stephen Harding), 'Bypass Security' (checkbox), 'Person Account Filter' (checkbox, highlighted with a red circle), 'Active' (checkbox), 'Create Tasks for Alerts' (dropdown menu set to 'No'), and 'Error Message' (text area with a placeholder message). At the bottom, there is a 'Filter Metrics' section with a 'Blocked Duplicates' field set to '0'. The page concludes with 'Save', 'Save & New', and 'Cancel' buttons.

This task is easily done via the Salesforce Setup page: Your Login Name→Setup→Create→Objects.
Search for the “DupeCatcher Filter” object on the Custom Object page and click the hyperlinked object name.

Home DupeCatcher Filters DupeCatcher Duplicate Alerts DupeCatcher Application Settings +

Personal Setup

- My Personal Information
- Email
- Import
- Desktop Integration
- My Chatter Settings

App Setup

- Customize
 - Create
 - Apps
 - Custom Labels
 - Objects**
 - Packages
 - Report Types
 - Tabs
 - Workflow & Approvals
- Develop
- Deploy
 - View Installed Packages
 - Critical Updates

Administration Setup

- Manage Users
- Company Profile
- Security Controls
- Communication Templates
- Translation Workbench
- Data Management
- Monitoring
- Mobile Administration
- Desktop Administration

Custom Objects [Help for this Page](#)

Custom objects are database tables that allow you to store data specific to your organization in salesforce.com. You can use custom objects to extend salesforce.com functionality or to build new application functionality.

Once you have created a custom object, you can create a custom tab, custom related lists, reports, and dashboards for users to interact with the custom object data. You can also access custom object data through the Force.com API.

[New Custom Object](#)

Action	Label	Installed Package	Master Object	Deployed	Description
Edit	Ad Group	Salesforce for Google AdWords		✓	A Google Ad Group is a collection of Text Ads and Keywords
Edit	DupeCatcher Duplicate Alert	DupeCatcher	DupeCatcher Filter	✓	
Edit	DupeCatcher Filter	DupeCatcher		✓	
Edit	DupeCatcher Filter Rule	DupeCatcher	DupeCatcher Filter	✓	
Edit	DupeCatcher Potential Duplicate	DupeCatcher	DupeCatcher Filter, DupeCatcher Duplicate Alert	✓	
Edit	DupeCatcher Required Field Support	DupeCatcher		✓	RequiredFieldSupport
Edit	Google Campaign	Salesforce for Google AdWords		✓	Google AdWords Campaigns are high-level marketing initiatives
Edit	Keyword	Salesforce for Google AdWords		✓	Keywords are the terms purchased in Google AdWords
Edit	Obsolete - DupeCatcher Setting	DupeCatcher		✓	
Edit	Override Cache	DupeCatcher		✓	
Edit	SFGA Version	Salesforce for Google AdWords		✓	This object is for administrative purposes only and records the current version of the Salesforce for Google AdWords application. Do not edit this object.
Edit	Search Phrase	Salesforce for Google AdWords		✓	Search Phrases are the search terms or phrases the user types into a search box
Edit	Text Ad	Salesforce for Google AdWords		✓	Text Ads are the advertising copy that displays on the search results page

Once on the “DupeCatcher Filter” custom object page, scroll down to the “Page Layouts” section (usually about 2/3 of the way down), and click Edit next to “Scenario Layout.”

Page Layouts [New](#) [Page Layout Assignment](#) [Page Layouts Help](#)

Action	Page Layout Name	Installed Package	Created By	Modified By
Edit Del	Scenario Layout	DupeCatcher	Stephen Harding, 5/5/2011 9:44 AM	Stephen Harding, 5/5/2011 10:43 AM

You will see the “Person Account Filter” checkbox field as an option in the upper section of the layout edit page. Click and drag the checkbox field and place it on layout of the Filter Detail page.

This DupeCatcher Filter is managed, meaning that you may only edit certain attributes. [Display More Information](#)

Scenario Layout ▾ [Mini Page Layout](#) [Mini Console View](#) | [Video Tutorial](#) [Help for this Page](#) ?

Save ▾ Quick Save Preview As... ▾ Cancel Undo Redo Layout Properties

Fields

Buttons
Related Lists

Quick Find Field Name *

Blank Space	Bypass Security	Duplicate Alert C...	FilterType	Merged Duplicates
Section	Converted Duplicates	Error Message	Last Modified By	Owner
Active	Created By	Filter Name	Match on Insert A...	Person Account Fi...
Blocked Duplicates	Create Tasks for ...	Filter Rule Count	Match On Update A...	Potential Duplica...

DupeCatcher Filter Sample

DupeCatcher Filter Detail

Standard Buttons: Edit Delete Clone Sharing Custom Buttons

Notice: A maximum of 12 filters can be active at one time!

Blank Space

Information

- Filter Name: Sample Filter Name
- FilterType: Sample FilterType
- Match on Insert Action: Sample Match on Insert Action
- Match On Update Action: Sample Match On Update Action

Owner: Sample User

Bypass Security: ☒

Active: ☒

Blank Space

Create Tasks for Alerts: Sample Create Tasks for Alerts

Blank Space

Filter Rule Count: 1,373

This DupeCatcher Filter is managed, meaning that you may only edit certain attributes. [Display More Information](#)

Scenario Layout ▾ [Mini Page Layout](#) [Mini Console View](#) | [Video Tutorial](#) [Help for this Page](#) ?

Save ▾ Quick Save Preview As... ▾ Cancel Undo Redo Layout Properties

Fields

Buttons
Related Lists

Quick Find Field Name *

Blank Space	Bypass Security	Duplicate Alert C...	FilterType	Merged Duplicates
Section	Converted Duplicates	Error Message	Last Modified By	Owner
Active	Created By	Filter Name	Match on Insert A...	Person Account Fi...
Blocked Duplicates	Create Tasks for ...	Filter Rule Count	Match On Update A...	Potential Duplica...

DupeCatcher Filter Sample

DupeCatcher Filter Detail

Standard Buttons: Edit Delete Clone Sharing Custom Buttons

Notice: A maximum of 12 filters can be active at one time!

Blank Space

Information

- Filter Name: Sample Filter Name
- FilterType: Sample FilterType
- Match on Insert Action: Sample Match on Insert Action
- Match On Update Action: Sample Match On Update Action

Owner: Sample User

Bypass Security: ☒

Person Account Filter: ☒

Active: ☒

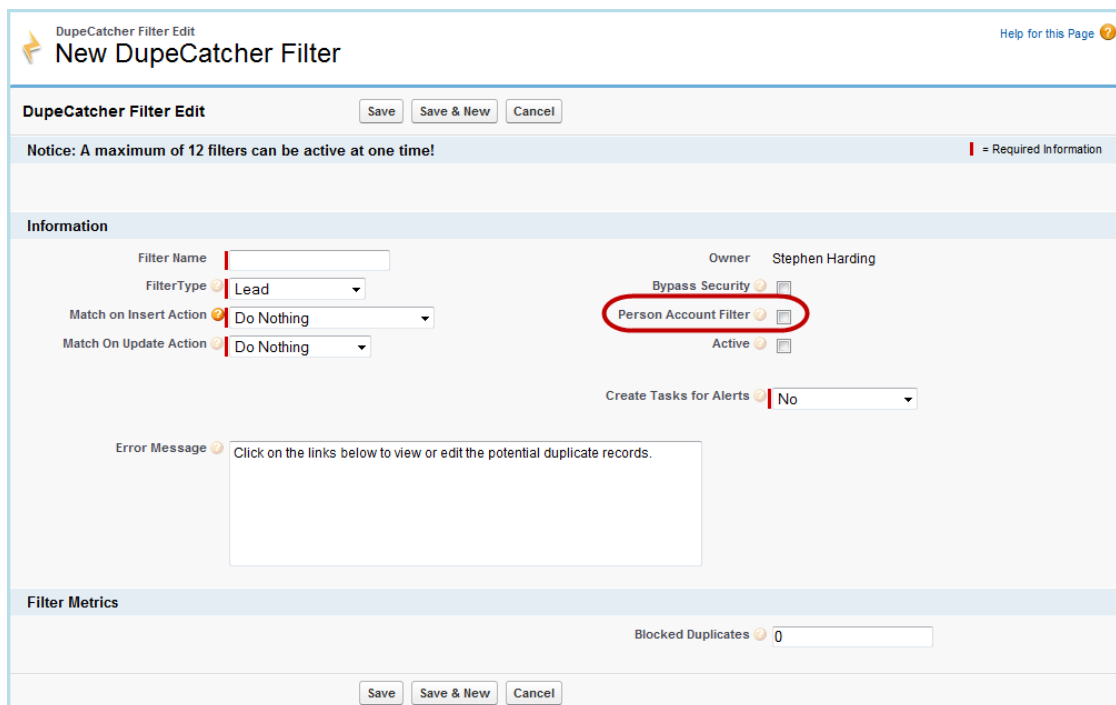
Blank Space

Create Tasks for Alerts: Sample Create Tasks for Alerts

Blank Space

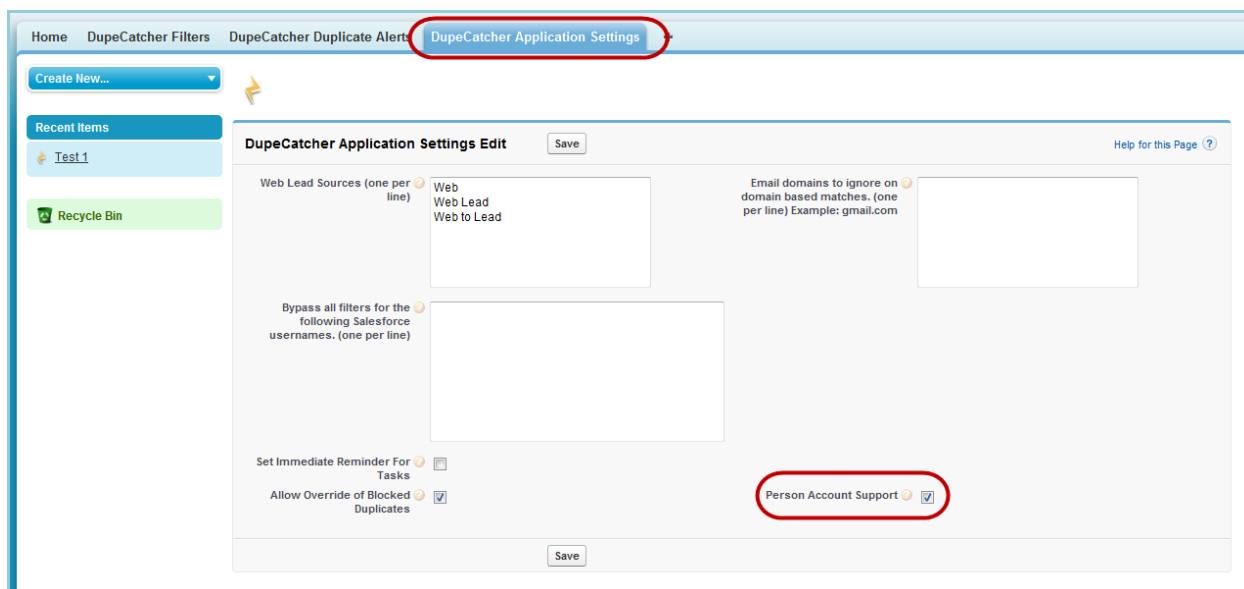
Filter Rule Count: 1,373

Click Save once you have the Person Account Filter checkbox field placed where you want it. The checkbox will now appear on the DupeCatcher Filter Edit page:



The screenshot shows the 'DupeCatcher Filter Edit' page. At the top, there's a 'New DupeCatcher Filter' header. Below it, a 'DupeCatcher Filter Edit' section contains buttons for 'Save', 'Save & New', and 'Cancel'. A notice states: 'A maximum of 12 filters can be active at one time!'. The 'Information' section includes fields for 'Filter Name', 'FilterType' (set to 'Lead'), 'Match on Insert Action' (set to 'Do Nothing'), and 'Match On Update Action' (set to 'Do Nothing'). There are also checkboxes for 'Bypass Security', 'Person Account Filter' (highlighted with a red circle), and 'Active'. A 'Create Tasks for Alerts' dropdown is set to 'No'. An 'Error Message' field contains the text: 'Click on the links below to view or edit the potential duplicate records.' The 'Filter Metrics' section shows 'Blocked Duplicates' as 0. At the bottom, there are 'Save', 'Save & New', and 'Cancel' buttons.

- Next, you must enable DupeCatcher deduplication of Person Accounts. This task is done via the DupeCatcher Application Settings tab. On that tab, simply check the “Person Account Support” checkbox, and click Save.



The screenshot shows the 'DupeCatcher Application Settings' page. The 'DupeCatcher Application Settings' tab is highlighted with a red circle. The page has a sidebar with 'Home', 'DupeCatcher Filters', 'DupeCatcher Duplicate Alerts', and 'DupeCatcher Application Settings'. The main content area is titled 'DupeCatcher Application Settings Edit' and includes a 'Save' button. It contains several sections: 'Web Lead Sources (one per line)' with a text area containing 'Web', 'Web Lead', and 'Web to Lead'; 'Email domains to ignore on domain based matches. (one per line) Example: gmail.com' with a text area; 'Bypass all filters for the following Salesforce usernames. (one per line)' with a text area; 'Set Immediate Reminder For Tasks' with a checkbox; 'Allow Override of Blocked Duplicates' with a checked checkbox; and 'Person Account Support' with a checked checkbox (highlighted with a red circle). At the bottom, there is a 'Save' button.

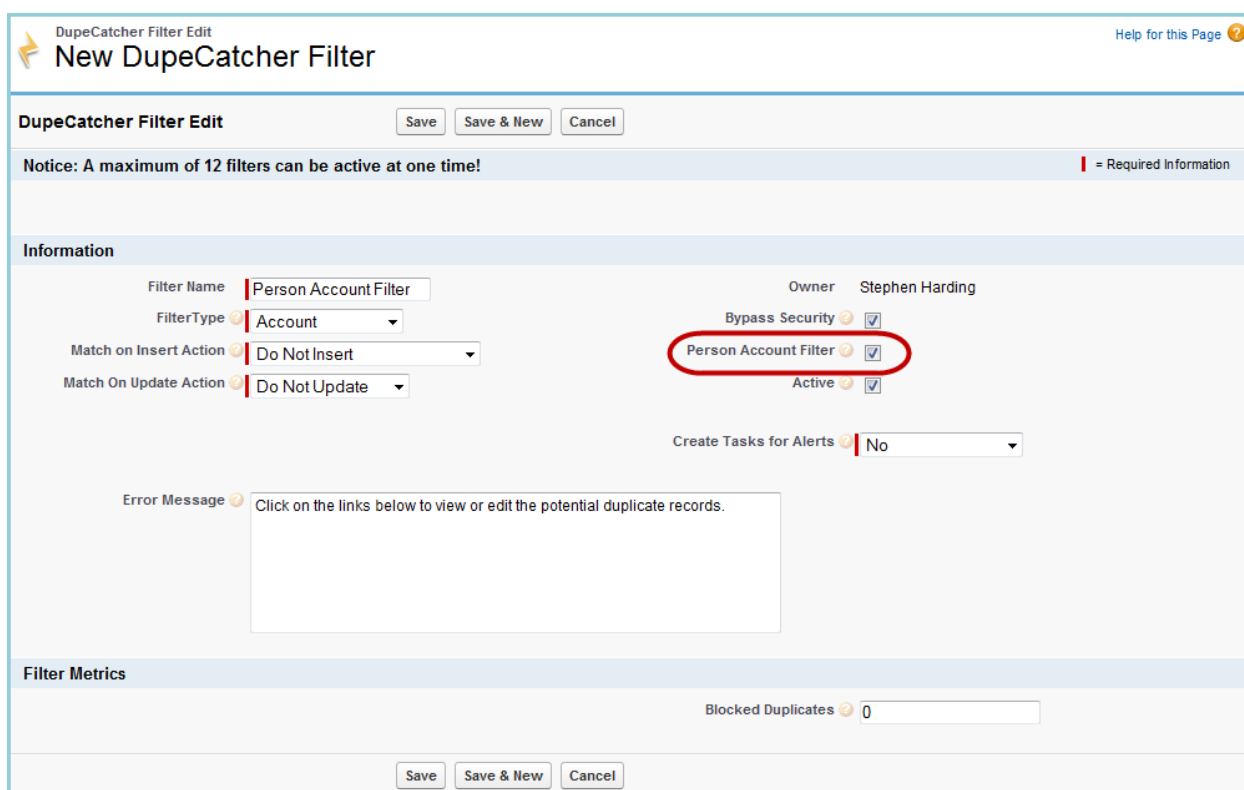
DupeCatcher is now setup to dedupe new incoming Person Accounts in your Salesforce org.

Creating a Person Account Filter

Creating a Person Account Filter is just like creating any other type of DupeCatcher Filter.

From the DupeCatcher Filters Tab, click New, and select the options for the Filter you want to create. The only difference is that you must check the Person Account Filter checkbox. Checking this box tells DupeCatcher what type of Account records to check and how to interpret new Lead records.

Note: You will not be able to save Contact or Lead to Contact Filters if the Person Account Filter checkbox is checked as Person Accounts are not relevant to these Filter types.



DupeCatcher Filter Edit Save Save & New Cancel Help for this Page ?

New DupeCatcher Filter

DupeCatcher Filter Edit Save Save & New Cancel

Notice: A maximum of 12 filters can be active at one time! | = Required Information

Information

Filter Name Owner Stephen Harding

FilterType Bypass Security ☒

Match on Insert Action **Person Account Filter** ☒

Match On Update Action Active ☒

Create Tasks for Alerts

Error Message

Filter Metrics

Blocked Duplicates

Save Save & New Cancel

DupeCatcher Person Account Behavior

DupeCatcher follows the same logic as Salesforce when it comes to Person Accounts. That is, if the Company field is left blank on a Lead or Account record, DupeCatcher interprets that record as a Person Account. See the following chart for an explanation of how DupeCatcher will behave under the various Filter configurations:

DupeCatcher Filter Type	Behavior
Lead without Person Account checked	<u>Only</u> checks new Leads with a populated Company field against Business Account Leads (existing Leads with populated company field)
Lead with Person Account checked	<u>Only</u> checks new Leads with a blank Company field against Person Account Leads (existing Leads with blank company field)
Account without Person Account checked	Checks against Business Accounts
Account with Person Account checked	Checks against Person Accounts
Lead to Account without Person Account checked	Checks against Business Account
Lead to Account with Person Account checked	Checks against Person Accounts
Contact	N/A
Lead to Contact	N/A

Application Settings

Web Lead Sources

DupeCatcher is designed with flexibility to enable you to manage leads in the way that best suits your organization, while still maintaining a high level of data quality. Merely blocking duplicate records from entering a database is not the only solution to data management and data quality. Sometimes there are reasons for allowing duplicates to be created at the point of entry and managed later. One example is leads that get automatically entered into Salesforce from a web site registration form. Because there is no human sitting between the web form and the Salesforce database, there is no way to check if new data is being entered beyond the matching fields set in DupeCatcher.

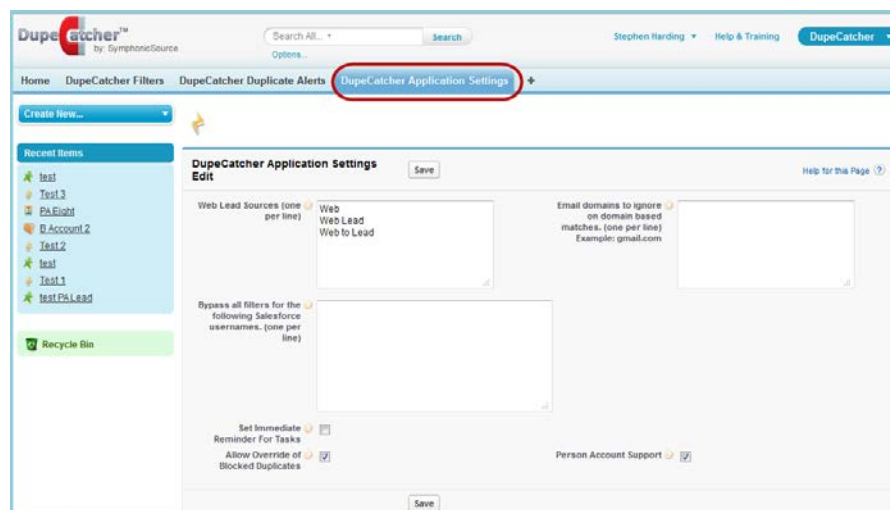
To accommodate this need, DupeCatcher provides an Application Settings tab where users can enter web lead sources (standard or custom). By default, DupeCatcher has the following lead sources set on the Application Settings tab: Web, Web Lead, Web to Lead (these lead sources can be removed).

Leads that come into the Salesforce Database with any of the lead sources set in the Application Settings tab will never be blocked and will be entered into the database. However, an alert will be set for the Salesforce/DupeCatcher admin to review the duplicate entries and take appropriate action.

When a web lead source is NOT listed on the Application Settings Tab, DupeCatcher may block the lead based on the Filters and Rules you have set. But, as a user, you are not alerted that the lead has been blocked.

When adding the lead source that gets listed on the record of a web-to-lead lead as it enters Salesforce to this chart, you must enter the lead source EXACTLY as it appears on the lead record.

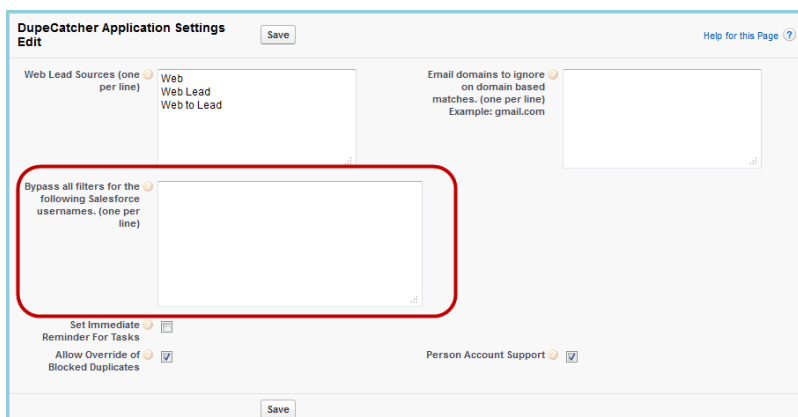
Be sure to click the “Save” button after making any changes on the Application Settings tab.



Bypass Filters for Listed Users

In certain cases, some organizations have a need to periodically bypass DupeCatcher Filters—in other words, create new records or update records in the database that are not subject to DupeCatcher filtering. To accommodate this need, DupeCatcher’s Application Settings tab has an area where a Salesforce login ID can be entered. Any access to the Salesforce org using a login ID that is listed here will NOT be subject to DupeCatcher filtering.

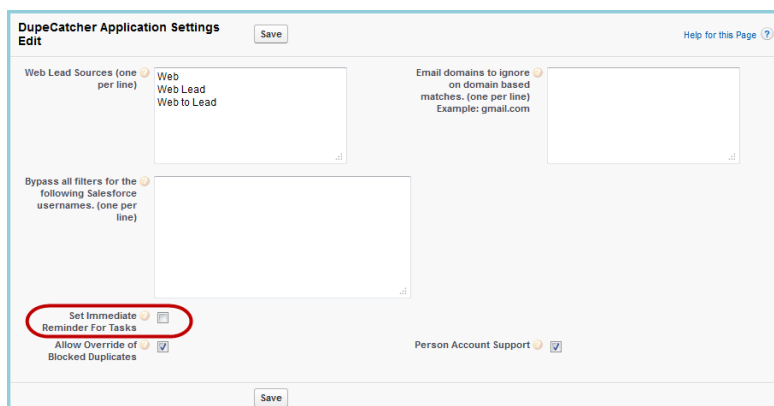
Be sure to click the “Save” button after making any changes on the Application Settings tab.

The screenshot shows the 'DupeCatcher Application Settings' page with the 'Edit' tab selected. A red rectangle highlights the 'Bypass all filters for the following Salesforce usernames. (one per line)' text area. Other visible fields include 'Web Lead Sources (one per line)' with 'Web', 'Web Lead', and 'Web to Lead'; 'Email domains to ignore on domain based matches. (one per line)' with 'Example: gmail.com'; 'Set Immediate Reminder For Tasks' (unchecked); 'Allow Override of Blocked Duplicates' (checked); and 'Person Account Support' (checked). 'Save' buttons are present at the top and bottom.

Set Immediate Reminder for Tasks

The Application Settings tab also provides the ability to set pop-up reminders for all tasks that get created (if selected) when the Match on Insert/Update Action is set to “Report Duplicate” (see the Creating Filters section above). Set these pop-up reminders by checking the box labeled “Set Immediate Reminder for Tasks” on the Application Settings tab.

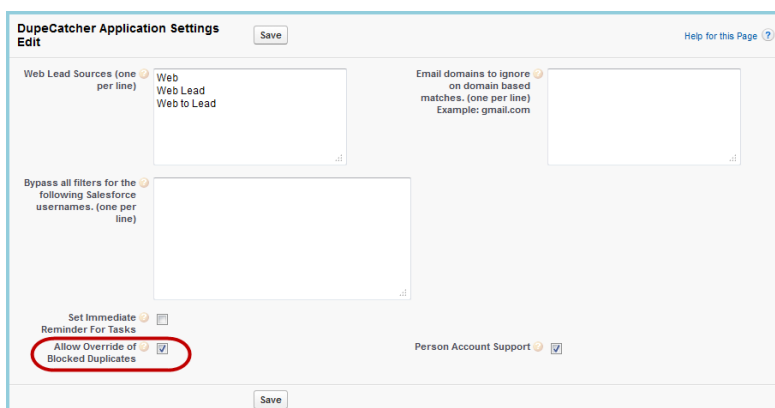
Be sure to click the “Save” button after making any changes on the Application Settings tab.

This screenshot is identical to the previous one, but the 'Set Immediate Reminder For Tasks' checkbox is now checked and highlighted with a red circle. The 'Save' button at the bottom is also visible.

Allow Override

DupeCatcher allows admins to control whether or not users can override a duplicate record that DupeCatcher blocks (see the Override Function section above for details). Selecting the “Allow Override” checkbox enables the feature and displays an Override button as part of the blocked duplicate warning message when the Match on Insert/Update Action is set to “Do Not Insert/Update.” NOTE: Due to API limitations, the Override function is only available in Enterprise Edition and higher. In addition, certain permissions may need to be set for Override to be enabled for all users.

Be sure to click the “Save” button after making any changes on the Application Settings tab.



DupeCatcher Application Settings Edit [Save](#) [Help for this Page ?](#)

Web Lead Sources (one per line)
Web Lead
Web to Lead

Email domains to ignore on domain based matches. (one per line)
Example: gmail.com

Bypass all filters for the following Salesforce usernames. (one per line)

Set Immediate Reminder For Tasks ☐

Allow Override of Blocked Duplicates ☒

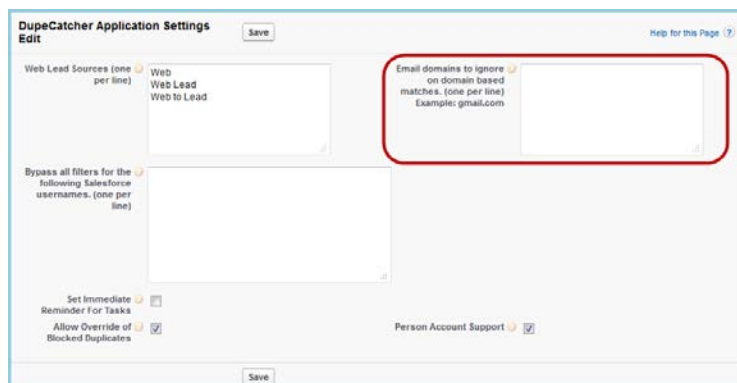
Person Account Support ☒

[Save](#)

Email Domains to Ignore

For DupeCatcher Filter Rules that match on email domain, you can limit results by entering domains of common, web-based email systems (Gmail, Hotmail, Yahoo, etc.) in the “Email Domains to Ignore” area. DupeCatcher will then ignore these domains when performing its scan. For example, enter “gmail.com” to prevent returning all records with email addresses with the gmail.com domain as duplicates.

Be sure to click the “Save” button after making any changes on the Application Settings tab.



DupeCatcher Application Settings Edit [Save](#) [Help for this Page ?](#)

Web Lead Sources (one per line)
Web Lead
Web to Lead

**Email domains to ignore on domain based matches. (one per line)
Example: gmail.com**

Bypass all filters for the following Salesforce usernames. (one per line)

Set Immediate Reminder For Tasks ☐

Allow Override of Blocked Duplicates ☒

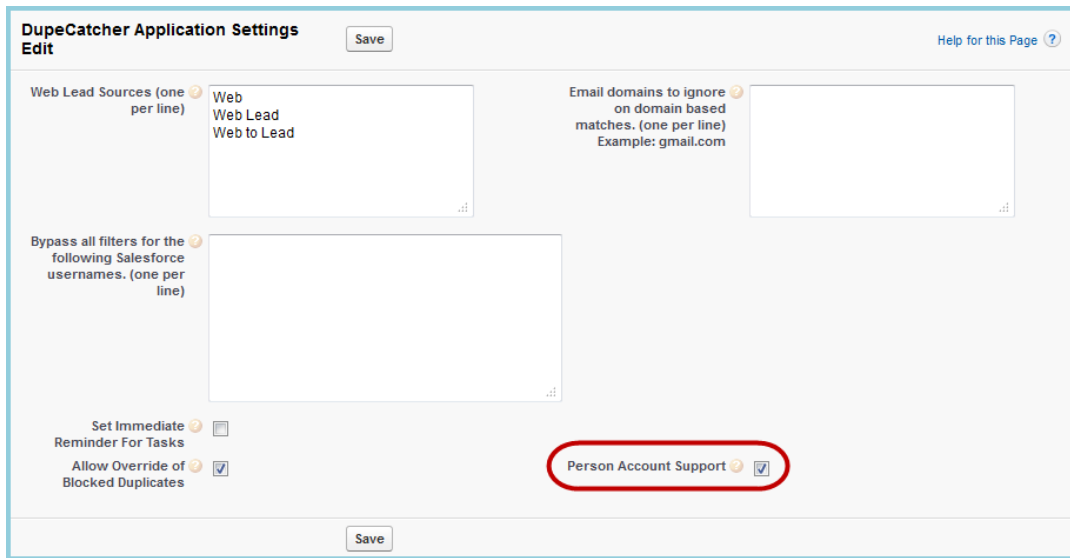
Person Account Support ☒

[Save](#)

Person Account Support

DupeCatcher supports deduplication of Person Accounts for Enterprise Edition orgs that have Person Accounts enabled. Select the “Person Account Support” checkbox to enable this function. Please see the section of this document specific to Person Accounts for detailed instructions on setting up DupeCatcher to dedupe Person Accounts, and for an explanation of how DupeCatcher handles Person Accounts.

Be sure to click the “Save” button after making any changes on the Application Settings tab.



The screenshot shows the 'DupeCatcher Application Settings' page in 'Edit' mode. The page has a 'Save' button at the top right and a 'Help for this Page' link. The settings are organized into several sections:

- Web Lead Sources (one per line):** A text area containing 'Web', 'Web Lead', and 'Web to Lead'.
- Email domains to ignore (one per line):** A text area with the example 'gmail.com'.
- Bypass all filters for the following Salesforce usernames (one per line):** An empty text area.
- Set Immediate Reminder For Tasks:** A checkbox that is currently unchecked.
- Allow Override of Blocked Duplicates:** A checkbox that is currently checked.
- Person Account Support:** A checkbox that is currently checked and is highlighted with a red oval.

A 'Save' button is located at the bottom center of the form.

Glossary

Filter: A Filter defines the standard Salesforce object(s) the DupeCatcher will operate on in checking for duplicates. Filters also define the method of reporting duplicates to the user. Filters must have Rules in order to function.

Rule: Rules work within Filters and define the fields and method of matching that DupeCatcher will use to identify duplicates.

Filter Types

Account: Identifies duplicates by matching selected fields from a new Account record being entered and the same fields within Account records existing in Salesforce.

Contact: Identifies duplicates by matching selected fields from a new Contact record being entered and the same fields within Contact records existing in Salesforce.

Lead: Identifies duplicates by matching selected fields from a new lead record being entered and the same fields within lead records existing in Salesforce.

Lead to Account: Identifies duplicate records by matching selected fields from a new lead record being created and the same fields within an Account record. Filter Rules also apply when an existing lead record is being converted to an account and contact.

Lead to Contact: Identifies duplicate records by matching selected fields from a new lead record being created and the same fields within a Contact record. Filter Rules also apply when an existing lead record is being converted to an account and contact.

Match on Insert Action

Display Matching Records: Displays a hyperlinked table of duplicate leads.

Do Not Insert: Duplicate record is not created and an alert message is displayed on the edit page with hyperlinks to the matched record(s). Override button appears as an option if enabled.

Do Nothing: The rule is ignored for Insert, but the related Update rule is enforced.

Report Duplicate: Duplicate record is allowed, but an alert is triggered for the Salesforce/DupeCatcher admin. Alerts are viewable from the DupeCatcher Duplicate Alerts tab, or from the individual Filter Details pages. Lead to Account and Lead to Contact Filters using this matching action will check for

matches within leads as well as accounts or contacts and include them in the alert. Merge and Convert functions are accessible using this matching action.

Match on Update Action

Do Not Update: Record is not updated, and an alert message is displayed on the edit page with hyperlinks to the matched record(s). Override button appears as an option if enabled.

Do Nothing: The rule is ignored for Update, but the related Insert rule is enforced.

Report Duplicate: Duplicate record is allowed, but an alert is triggered for the Salesforce admin. Alerts are viewable from the DupeCatcher Duplicate Alerts tab, or from the individual Filter Details pages. Lead to Account and Lead to Contact Filters using this matching action will check for matches within leads as well as accounts or contacts and include them in the alert. Merge and Convert functions are accessible using this matching action.